Period-Based Curricula (Advanced Topic)

VA TMS Administrators
Role-Based Training

Virtual Instructor-Led Training

Participant Guide

May 2015

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1.0 About This Training

1.1 *Training Purpose*
The purpose of the Period-Based Curricula is to provide detailed information about initial and retraining assignments within a curriculum and how to work with them in the VA TMS.

1.2 *Target Audience*
This session is an Advanced Topic training session for any VA TMS administrators with some experience in Period-Based Curricula that are looking for more in-depth instruction.

1.3 *Training Length*
This training will run for approximately 3.5 hours. Brief breaks will be given.

1.4 *Participant Guide*
This Participant Guide contains all key content presented in this training, including PowerPoint slides with room for taking notes, activities, and demonstrations for each lesson.

The Participant Guide is divided into two sections:

- About This Training
- Training Content

NOTE: Print a hardcopy of this Participant Guide to use during training. You will need to reference the steps for all demonstrations and activities in this guide while completing steps in the VA TMS.

1.4.1 Participant Guide Icons

Icons	Description
	This icon indicates that there will be a demonstration conducted by the instructor within the VA TMS.
	This icon indicates that participants will complete an activity.
	This icon indicates that there is a job aid available for the task.

1.5 *Participant Preparation and Guidelines*

1.5.1 Requirements

Participants must complete the following for this training:

- Register for training through the VA TMS.
- Print a hardcopy of this Participant Guide for use during the training. It will be difficult to access electronically during training.

1.5.2 Demonstrations and System Practice Activities in VA TMS

During this training, you will observe instructor demonstrations and complete system practice activities within the VA TMS. These demos and activities will allow you to study and apply what you've learned about the features, functions, and processes critical to your role within the VA TMS. The steps for each demonstration and system practice activity have been provided in this guide so you can follow-along. You may also want to reference these steps after the training.

1.5.3 Virtual Instructor-Led Training Guidelines

This training will be delivered as a Virtual Instructor-Led Training (VILT) using a Web conferencing software program. You will need a computer and phone with speakers or headset in order to participate in this training. Follow the guidelines below to ensure the best training experience:

- Print a hardcopy of the Participant Guide for use during training.
- Be sure to log in to the Web conferencing software and dial in to the conference line 5 – 10 minutes early.

- Mute your phone line for the duration of the training session unless otherwise instructed.

- Use the chat feature for any questions during the session.

- The instructor may be able to answer your question immediately. Otherwise, he or she will answer at the end of the training, or send an e-mail afterward.

1.6 *VA TMS Administrators Role-Based Training Sessions and Target Audiences*

The table below includes a list of all training sessions in this training series, along with the target audience.

Session	Required for	Recommended for
Introduction to VA TMS for All Administrators and Help Desk and Reports Managers	• Help Desk (as stand-alone training • Reports Managers (as stand-alone training) • Assignment Managers • Scheduling Managers • Registration Managers • Domain Managers • Learning Managers • Item Managers • AP Managers	n/a
VA TMS Training for Scheduling Managers, Assignment Managers, and Registration Managers	• Assignment Managers • Scheduling Managers • Registration Managers	• Domain Managers • Learning Managers • Item Managers • AP Managers

NOTE: There are also advanced topic sessions that are optional for managers who already have experience using the VA TMS.
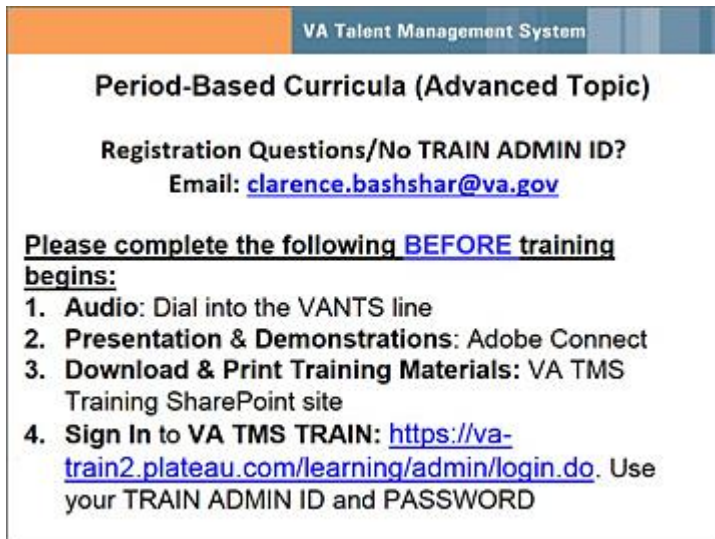
1.7 *VA TMS Functions and Associated Roles*

NOTE: Gray columns indicate add-on roles; white columns indicate stand-alone roles.

VA TMS Admin Function	LM	DM	IM	RM	SM	AM	APM	HD	PR	QEM	CM	CIM	HR	RPT	AHN	PM	COM	ACM	ACIM	MSE	MSEHD
Unlock User Accounts	X							X	X												
Reset User Passwords	X							X	X												
Change Supervisors for a group of Users	X																				
Proxy into Users accounts	X							X													
Add/Remove Items to/from Learning Plan	X					X															
Add/Remove Curricula Assignments	X					X															
Record Item/External Event/Scheduled Offerings	X			X																	
Edit/Delete Recorded Learning Events	X			X																	
Merge User Records		X																			
Add/Edit Items	X		X																		
Add/Edit Curricula	X		X																		
Send Notifications	X														X						
Add/Edit Scheduled Offerings	X				X																
Register Users into a Scheduled Offerings	X			X	X																
Edit User's Registration in Scheduled Offering	X			X	X																
Assign/Remove Competency Profiles to/from Users											X										
Assign/Remove Competencies to/from Users											X										
Manage Administrator Accounts		X																			
Add/Edit/Copy/Delete Assignment Profiles							X														
Edit User Preferred Accreditations	X							X										X			
Edit User Occupational Categories	X							X										X			
Add/Edit/Delete Competencies											X										
Add/Remove Competencies from Items												X									
Add/Edit/Delte Competency Profiles											X										
Enter/Delete Competency Assessments for Users	X			X		X					X										
Add/Edit/Delete Questions										X											
Add/Edit/Delete Exam Objects										X											
Assign/Remove Questions to/from Exam Objects										X											
Add Questionnaire/Surveys										X											
Unassign a Survey from Users	X																				
Edit Organization Dashboard Ownership		X																			
Add/Edit Accreditations																		X			
Apply Accreditations to Items																		X	X		
View sensitive information on Users Records													X								
Create and Manage Communities																X					
Run various Standard and Custom Reports	X		X	X	X	X							X	X							
View Self Enrolled User	X					X			X											X	X
Validate Self Enrolled User																				X	
Bookmark Available Entities	X		X	X	X	X		X													
Download Search Results	X		X	X	X	X	X	X	X	X	X	X	X	X		X	X	X	X	X	X

Talent
Management
System
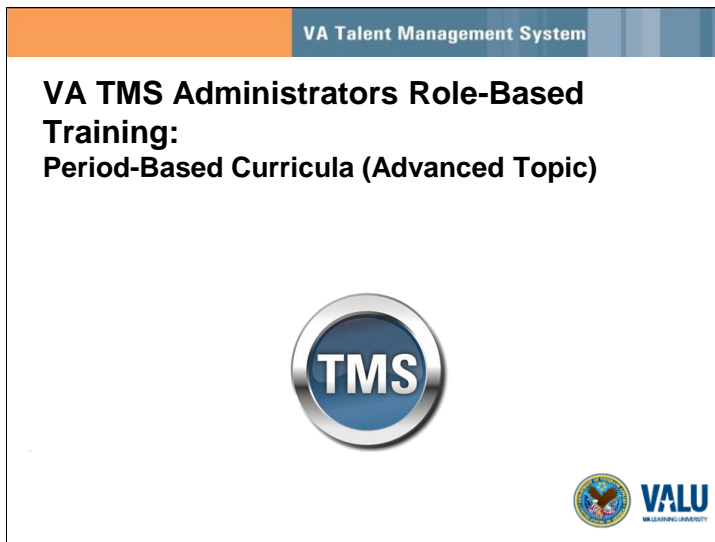
VALU
VA LEARNING UNIVERSITY

2.0 Training Content

2.1 *Welcome*

Notes:

Slide 1: Session Preparation

Notes:

Slide 2: VA TMS Administrators Role-Based Training:
Period-Based Curricula (Advanced Topic)

Slide 3: Session Agenda

Notes:

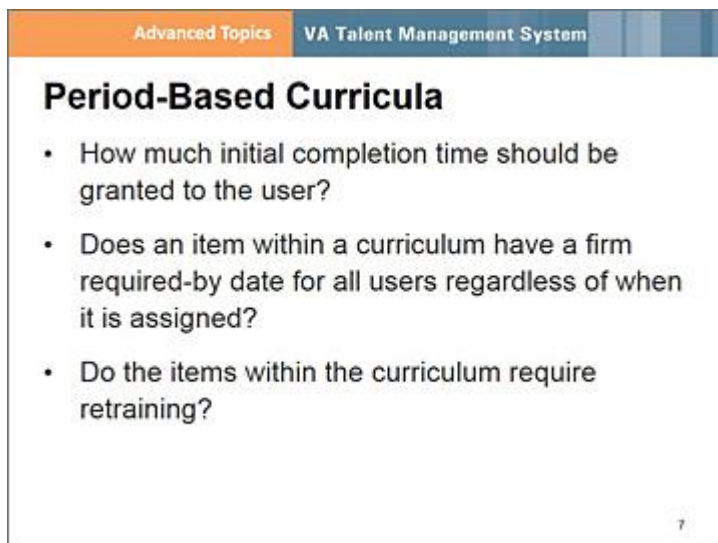Slide 4: Session Objectives

Notes:

Slide 5: Introductions

Notes:

2.2 Lesson 1: Period-Based Curriculum Overview
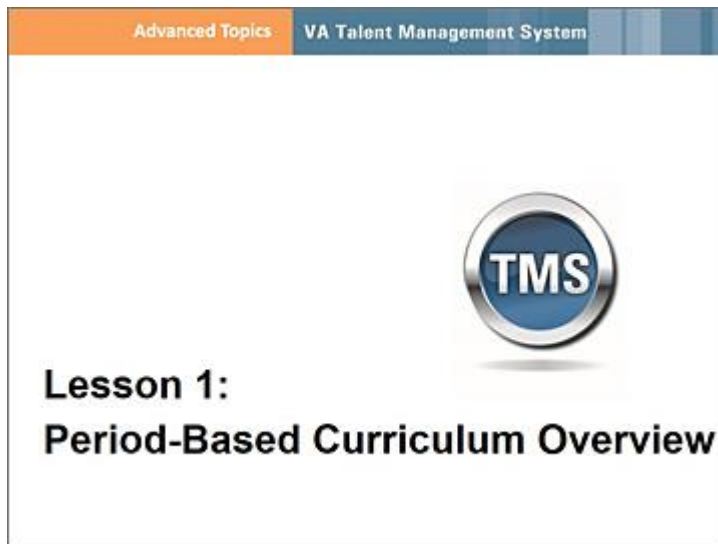
Notes:

Slide 6: Lesson 1: Period-Based Curriculum Overview

Notes:

Slide 7: Period-Based Curricula

Slide 8: Retraining

Notes:

Slide 9: Item Settings

Notes:

Slide 10: Effective Date

Notes:

Slide 11: Assignment Type

Notes:

Slide 12: Event vs. Calendar Basis

Notes:

Slide 13: Event Basis

Notes:

2.3 *Lesson 2: Determining Required-By Dates*

Slide 14: Lesson 2: Determining Required-By Dates

Notes:

Slide 15: Period Start Date

Notes:

Slide 16: Required Dates Practice

Notes:

Slide 17: Event Basis Example
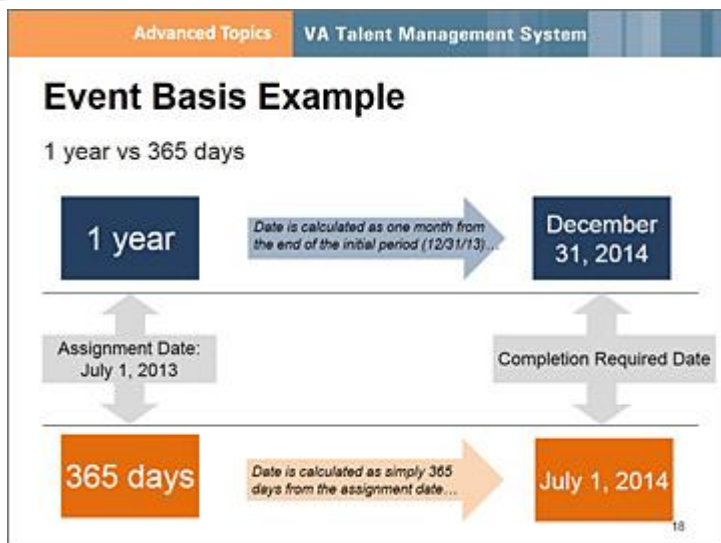
Notes:

Slide 18: Event Basis Example
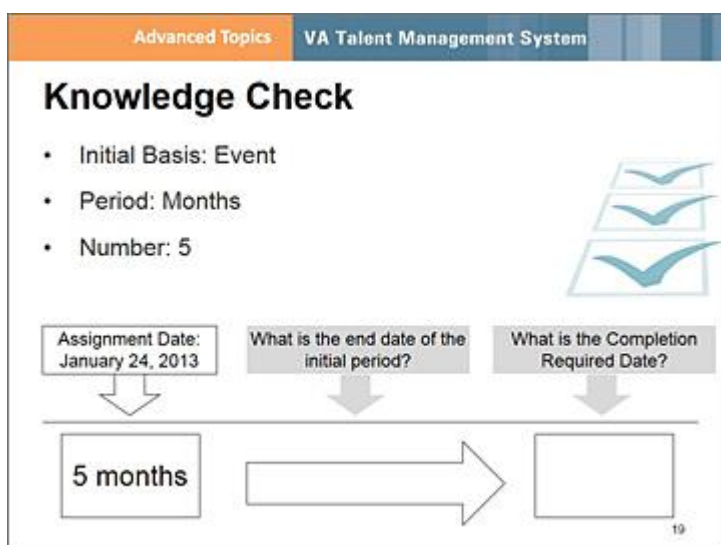
Notes:

Slide 19: Knowledge Check

Notes:

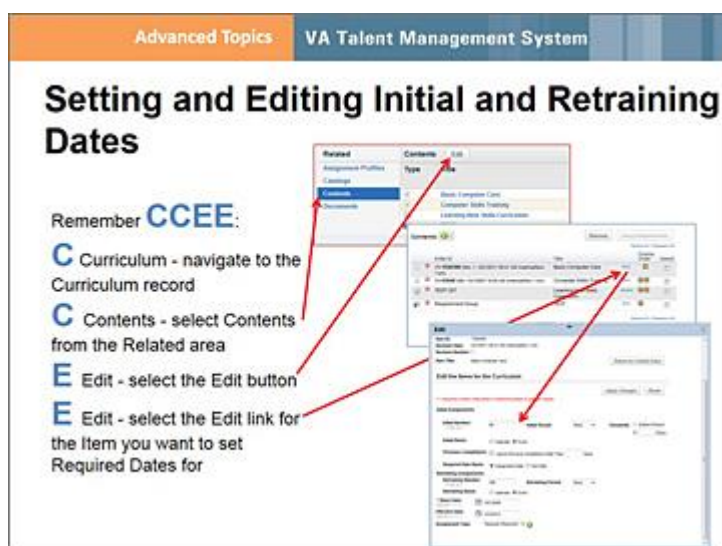Slide 20: Knowledge Check

Notes:

Slide 21: Knowledge Check

Notes:

2.4 *Lesson 3: Setting Required Dates within an Item*

Slide 22: Lesson 3: Setting Required Dates within an Item

Notes:

Slide 23: Setting and Editing Initial and Retraining Dates

Notes:

Slide 24: Demonstration: Setting Required-By Dates in a Curriculum

Notes:

Demonstration: Setting Required-By Dates in a Curriculum

For this demonstration, you will find a curriculum, copy it to make it your own, and set dates.

1. Navigate to **Learning > Curricula.**
2. Search for and select a curriculum.
3. Select **Contents** from the Related area of the record.
4. Select the **Edit** button (do not select the item title; this will navigate you to the item entity).
5. Locate the item to modify and select the **Edit** link.
6. In the Initial Assignments section, enter an initial number.
7. Select **days** as initial period.
8. Select **event** as initial basis.
9. In the Retraining Assignments section, enter a retraining number.
10. Select **days** as the retraining period.

Slide 25: System Login

Notes:

Slide 26: Activity #1: Setting Required-By Dates within
a Curriculum

Notes:

Activity #1: Setting Required-By Dates within a Curriculum

1. Navigate to **Learning > Curricula.**

2. Search for and select a curriculum.

3. Select **Contents** from the Related area of the record.

4. Select the **Edit** button (do not select the item title; this will navigate you to the item entity).

5. Locate the item to modify and select the **Edit** link.

6. In the Initial Assignments section, enter an initial number.

7. Select **days** as initial period.

8. Select **event** as initial basis.

9. In the Retraining Assignments section, enter a retraining number.

10. Select **days** as the retraining period.
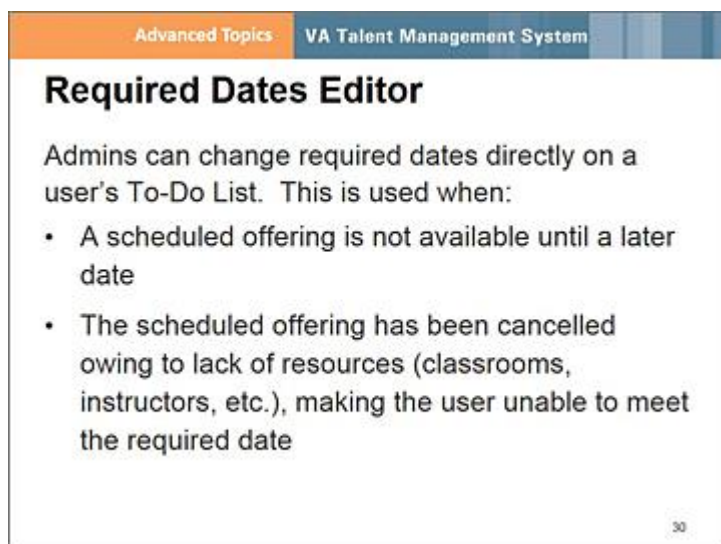
Slide 27: Knowledge Check

Notes:

Slide 28: Knowledge Check

Notes:

2.5 *Lesson 4: Required Dates Editor and Learning Event Synchronization*

Notes:

Slide 29: Lesson 4: Required Dates Editor and Learning Event Synchronization

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Slide 30: Required Dates Editor

Slide 31: Demonstration: Required Dates Editor

Notes:

Demonstration: Required Dates Editor

Admins use the Required Dates Editor to update required dates using the same method as assignment. For example, if an admin assigned Item A via curriculum 1, then he/she must update the required date by specifying Item A in curriculum 1 in the Required Dates Editor. Likewise, if an admin assigned an Advanced Project Management item directly to a user's To-Do List, then he/she must specify the item in the Required Dates Editor.

1. Navigate to **Learning > Tools > Required Dates Editor**.

2. Select the **add one or more** from list link to add users.

3. Enter search criteria to search for users.

4. Select **Search**.

5. Check the **Add** checkboxes next to each user who needs a required date change.

6. Select **Add**.

7. Select **Next**.

8. Select the **add one or more from list** link to search for curricula to add.

9. Enter search criteria.

10. Select **Search**.

11. Check **Add** next to each curriculum to add.

12. Select **Add**.

13. Select **Next**.

14. Select **Next**.

15. Enter a new required date for each item listed.

16. Select **Finish** to finalize the Required Dates Editor.

Slide 32: Learning Events Synchronization

Notes:

Slide 33: Knowledge Check

Notes:

Slide 34: Evaluation & Self-Certification Reminder

Notes:

Slide 35: Questions?

Notes: